Day Services Invoice Tool User Guide

2008

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1.0 The Day Services Invoice Tool

The Day Services Invoice Tool is a web-based tool designed to assist healthcare providers in creating invoices based on the number of direct care service hours provided, the number of consumer hours used, and the applicable rates under the HCBS waiver published rate system.

1.1. Product Support

If you encounter a problem with this product, or if you have a question or recommendation regarding this user guide, log a HelpBox request. A member of the FSSA Technology Services Team (FTST) will contact you to address the issue.

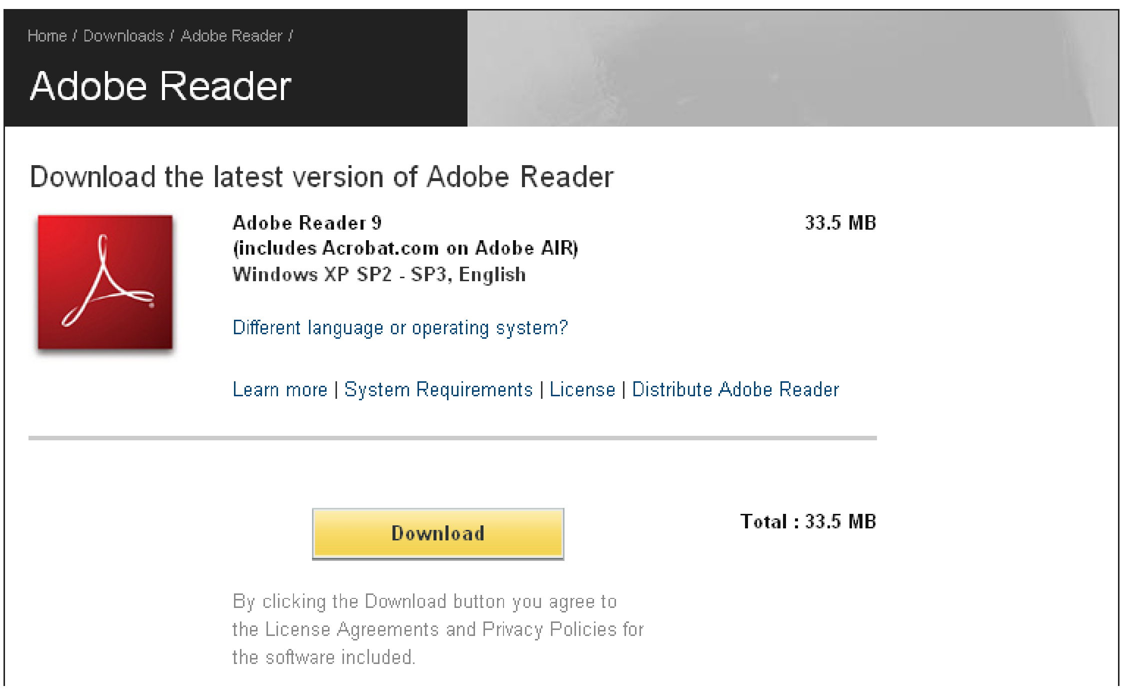
1.2. Installing and Testing the Latest Version of Adobe Reader

You can access the most updated copy of this user guide and other documentation from the DDRS website. To view the documents, you must install the Adobe Reader on your computer. Use the following procedure to install and test the latest version of Adobe Reader on your computer (the procedure assumes that you have not installed the Adobe DLM ActiveX control).

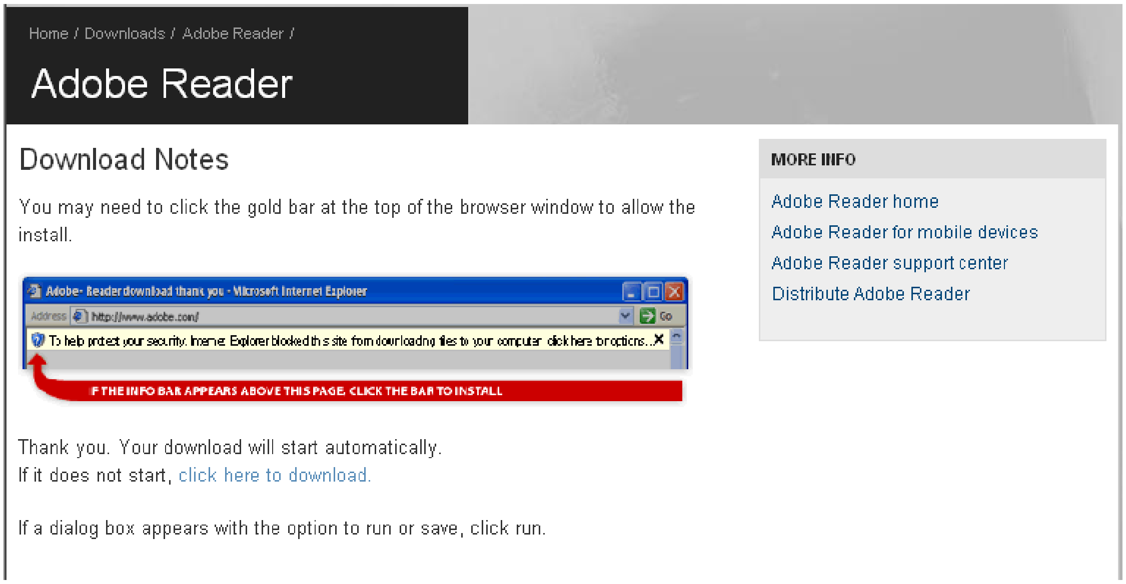
1. Select the following link or enter the URL into the **Address** field of your browser:

   http://www.adobe.com/products/acrobat/readstep2.html

   The Adobe Reader web page appears, as shown in the following illustration:

2. Select the gold **Download** button. The system displays the following screen and a gold bar appears at the top of your browser window:



3. Select **Click here to install** from the gold bar at the top of the browser window, and then select **Install ActiveX Control** from the shortcut menu that appears.

4. Select **Install** in the **Internet Explorer - Security Warning** window that appears.

5. Wait several seconds as one or more Adobe progress windows appear, indicating the progress of the installation. When the installation is complete, the **getPlus: Info** window appears and indicates that the installation is complete.

6. Select **OK** in the **getPlus: Info** window.

7. Test the Adobe Reader installation by selecting a PDF file from either the network or a SharePoint site.

Tip
Select the following link to display a SharePoint page that contains multiple PDF files that you can use:

https://myshare.in.gov/FSSA/ddrs/WebBased%20Tools/Forms/AllItems.aspx

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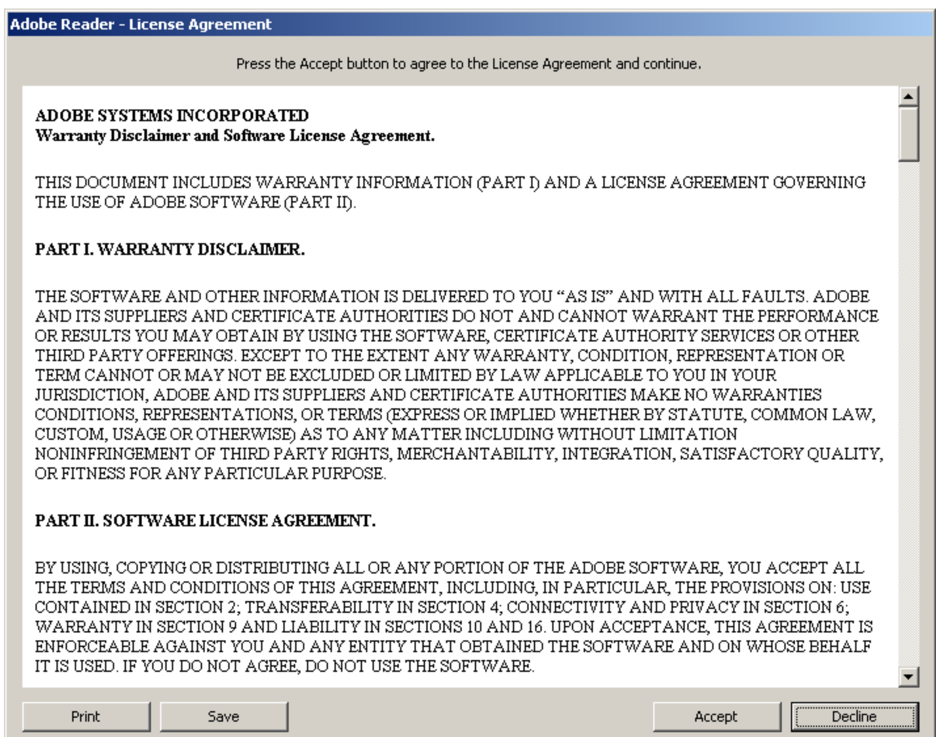
8. Ensure that the **Read Only** radio button is selected in the **Microsoft Internet Explorer** window that appears and then select **OK**.

The following illustration shows an example of the **Microsoft Internet Explorer** window:

Because this is the first PDF you have opened after installing the Adobe Reader, the **Adobe Reader – License Agreement** window appears, as shown in the following illustration:



9. Select **Accept** to display the PDF file for the document you selected.

   The **Adobe Reader – License Agreement** window appears only once. After you perform the remaining steps in this procedure, the license agreement will not appear again when you select a PDF file.

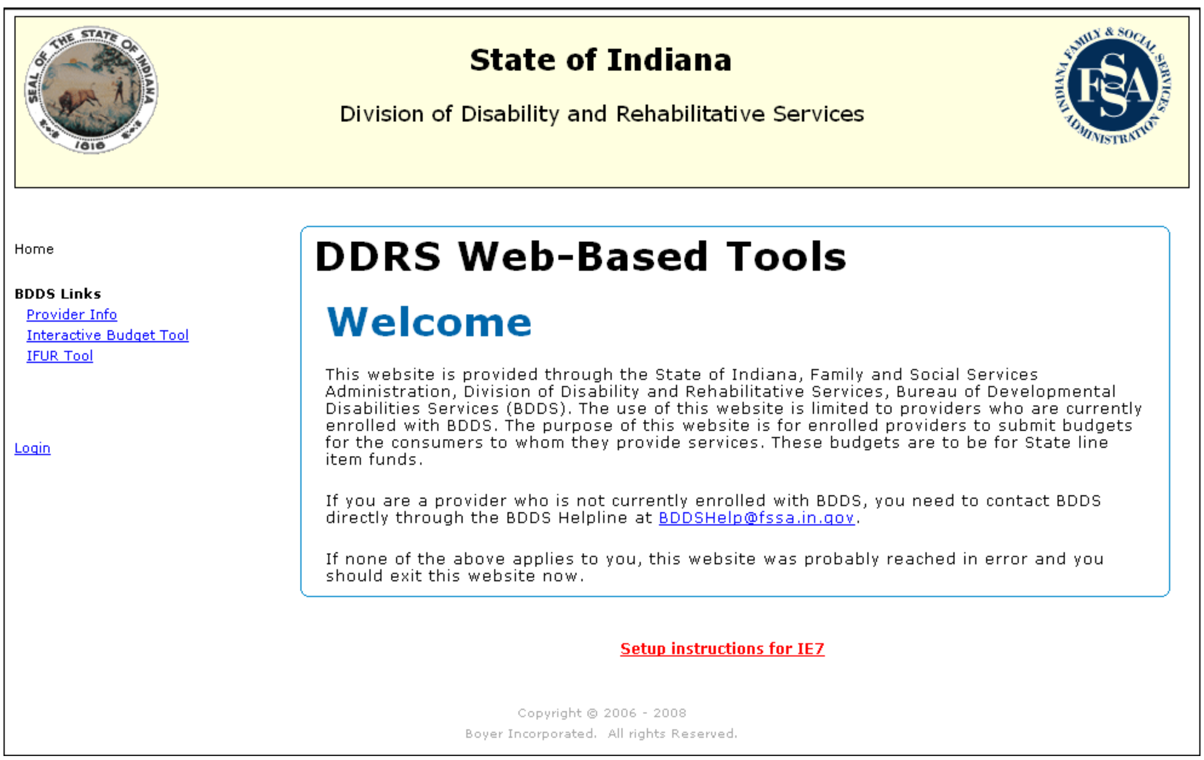
1.3. Accessing the DDRS Web-Based Tools Page

The Day Services Invoice Tool resides on the DDRS Web-Based Tools page. You can use the following link to access the DDRS Web-Based Tools page:

https://ddrsprovider.fssa.in.gov/

The DDRS Web-Based Tools page contains a fixed menu list on the left side. The linked menu items in the menu list change according to the menu that you select.

The following illustration shows the DDRS Web-Based Tools page before you log in.



Select **Login** from the menu list to access the system. If this is the first time that you have logged in to the site, the following message might appear. This message can also be seen by selecting the Setup Instructions for IE7 link at the bottom of the page.

WARNING! A budget will not be able to be previewed until the following is completed.

In order for this website to function properly, you must add this website as a '**Trusted Site**' in your Internet Explorer browser. Please complete the following steps:

1. Click on '**Tools**' in the main menu bar; if the main menu is not visible, press the '**Alt**' key (or '**Tools**' on the toolbar, if visible)
2. Click on '**Internet Options...**' in the pull-down list
3. Click on the '**Security**' tab of the '**Internet Options**' window
4. Click on the '**Trusted Sites**' icon
5. Click on the '**Sites...**' button
6. Make sure the box for '**Require server verification (https:) for all sites in this zone**' is NOT checked
7. In the '**Add this Web site to the zone:**' textbox, type '**ddrsprovider.fssa.in.gov**' (if it does not automatically appear there)
8. Click the '**Add**' button; The website name will now appear in the '**Web sites:**' box
9. Click the '**OK**' button on each of the two windows that are open
10. Click on the refresh icon in Internet Explorer or press the '**F5**' key on your keyboard to refresh the web page
11. Click on the '**Return Home**' link below these instructions; This will take you to the website Home page where you will need to click the '**Login**' link again to go to the Login page

If, after completing steps 1-11 above, you can still not login to this website, you might need to adjust the pop-up blocker settings for this website by doing the following:

12. Click on '**Tools**' in the main menu bar; if the main menu is not visible, press the '**Alt**' key (or '**Tools**' on the toolbar, if visible)
13. Click on '**Pop-up Blocker**'
14. Click on '**Pop-up Blocker Settings**'
15. In the '**Address of website to allow**' textbox, type '**ddrsprovider.fssa.in.gov**' (if it does not automatically appear there)
16. Click the '**Add**' button; the website name will now appear in the '**Allowed Sites**' box.

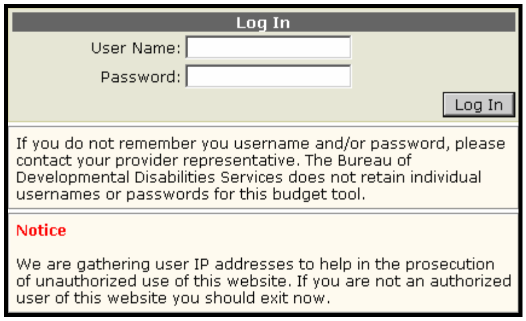
You might need to change other pop-up blocker settings to allow pop-ups from this website.

For further information, you can go to the following Microsoft website:
http://www.microsoft.com/windows/ie/ie6/using/howto/security/settings.mspx

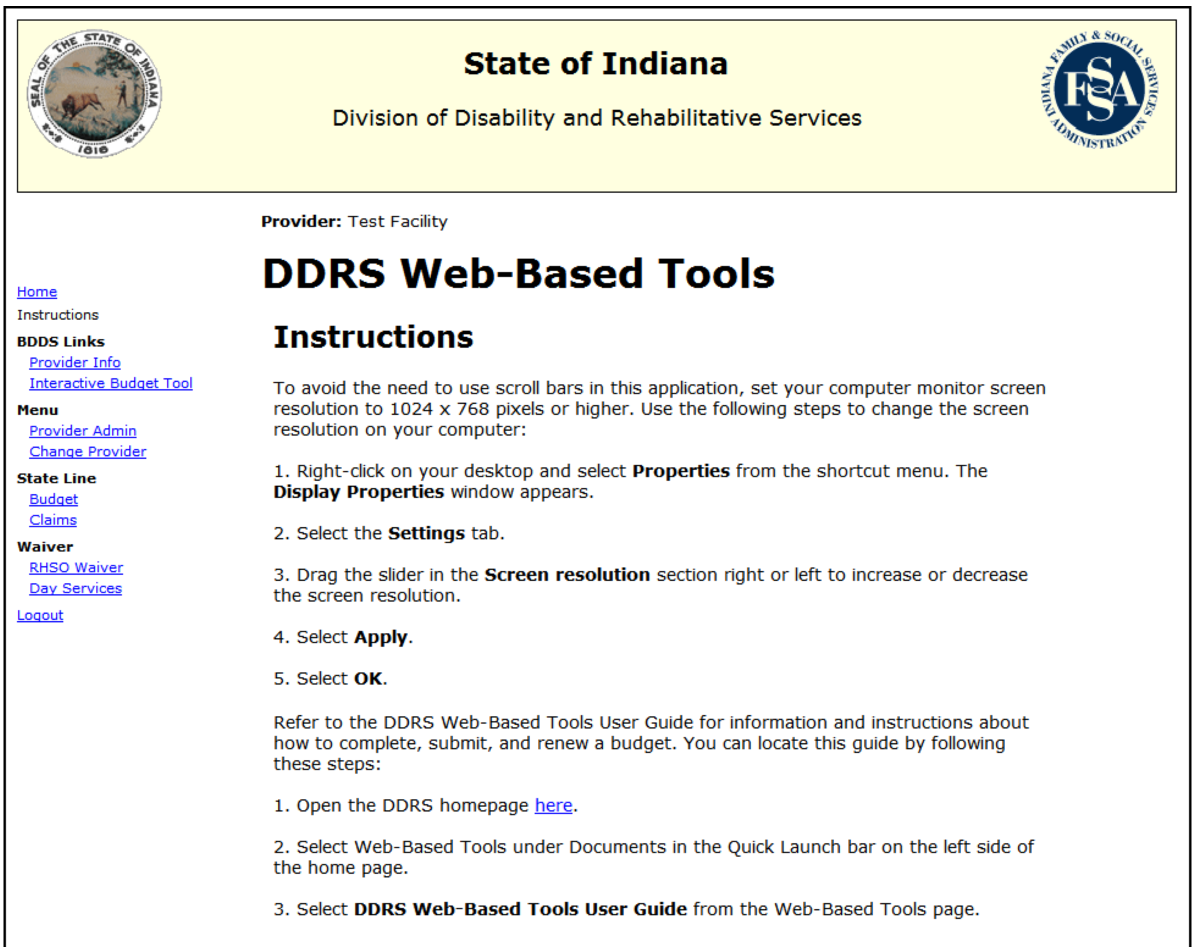
Return Home

Follow the instructions to properly set your computer to be able to view and use the website. When you complete the instructions, the **Log In** window appears.

The following illustration shows an example of the **Log In** window.



Complete the information in the **Log In** window and select **Log In**. The Instructions page appears. The following illustration shows an example of the Instructions page (notice how the menu structure has changed, as mentioned previously):

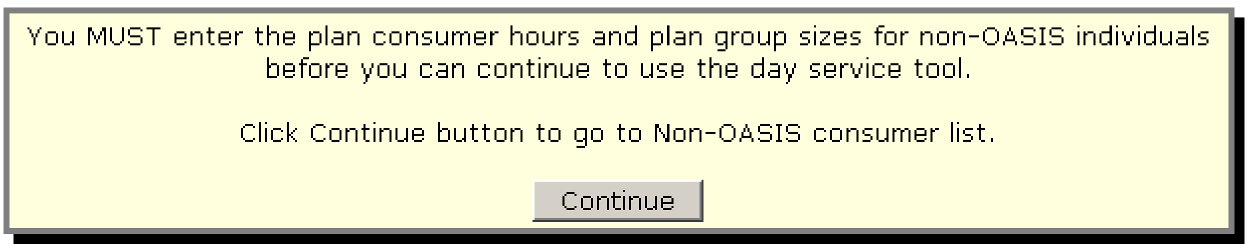


2.0 Using the Day Services Invoice Tool

Select the **Day Services** link under **Waiver** in the menu list. One of the following items appears:

- A non-OASIS consumer list message
- The Invoices in Progress page

Non-OASIS Consumer List Message
The following message appears after you select the **Day Services** link when one or more non-OASIS consumers exist for your agency:



Select the **Continue** button and follow the procedures in Section 2.1, Working with Consumers on the Non-OASIS Consumers List.

Invoices in Progress Page
The Invoices in Progress page appears after you select the **Day Services** link when a non-OASIS consumer does not exist for your agency. To begin working with the Invoices in Progress page, refer to Section 3.0, Generating a Day Services Invoice.

2.1 Working with Consumers on the Non-OASIS Consumers List

When you select the **Continue** button on the message window that appears for non-OASIS consumers, the system displays the following windows and lists in the order shown:

1. The **Non-OASIS Consumer List**
2. A search window
3. A search results table
4. The **Add/Edit Consumer Name** window

The following illustration shows an example of the windows and lists that appear when you select the **Continue** button on the message window that appears for non-OASIS consumers:

Create New Invoice Invoices in Progress Finalized Invoices User Guide Help

Non-OASIS Consumer List

1

You MUST enter the plan consumer hours and plan group sizes for non-OASIS individuals below.

First Name	Last Name	Funding Source	Service	Service Month
IRA	BANKS	ICFMR	VOCO	06/01/2008
TRACY	BARKER	ICFMR	VOCO	06/01/2008
NATALIE	BARNETT	ICFMR	CHGO	06/01/2008
NATALIE	BARNETT	ICFMR	FHGO	06/01/2008
JUSTIN	BARRETT	ICFMR	VOCO	06/01/2008

1 2 3 4 5 6 7 8 9 10 ...

2

First Name	Last Name	Funding Source	Service	
		All	All	Search

3

Consumer Name	Funding Source	Act		
ABIGAIL LYONS	ICFMR	Yes	Edit	Delete
ALBERT VEGA	ICFMR	Yes	Edit	Delete
ALISA SHARP	SSBG/DDRS State Line	Yes	Edit	Delete
ALLEN WADE	ICFMR	Yes	Edit	Delete
ALVIN STEELE	SSBG/DDRS State Line	Yes	Edit	Delete
AMIE SCHULTZ	ICFMR	Yes	Edit	Delete
AMY CHEN	ICFMR	Yes	Edit	Delete
ANDRE JOSEPH	ICFMR	Yes	Edit	Delete
ANDREA BECKER	ICFMR	Yes	Edit	Delete
ANGELA SUTTON	ICFMR	Yes	Edit	Delete

1 2 3 4 5 6 7 8 9 10 ...

4

Add/Edit Consumer Name

First Name Last Name

Funding Source: Select Active: ☑

Add Cancel

2.1.1 The Non-OASIS Consumer List

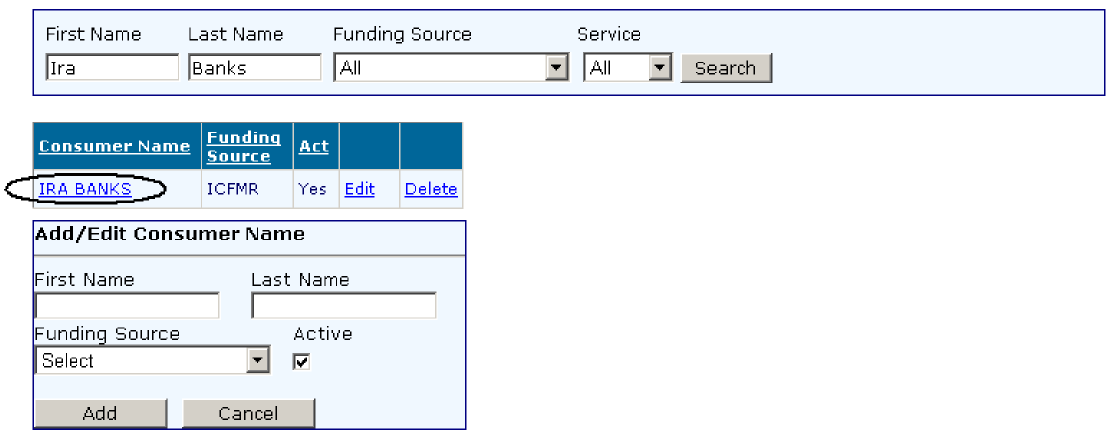
The Non-OASIS Consumer List displays the non-OASIS consumers on the system that received services. The list displays five consumers at a time. Page numbers for additional consumers appear at the bottom of the list. You must update the service information for the listed consumers by using the other items on the screen.

2.1.2 The Search Window and Search Results Table

To update the service information for a consumer, you must first locate the consumer. You can use any combination of the following fields in the search window to locate a consumer on the list:

- **First Name**
- **Last Name**
- **Funding Source**
- **Service**

When you select **Search**, the consumers listed in the search results table change. For example, if you search for Ira Banks based on first name and last name, the search results table shrinks to display one entry, as shown in the following illustration:



After you have located the consumer, you can:

- Select the consumer name link from the search results table to update the service information for the consumer.
- Select the **Edit** link from the search results table to edit the consumer's information.
- Select the **Delete** link from the search results table to delete the consumer from the **Non-OASIS Consumer List**.

2.1.3 How to Update Service Information for a Non-OASIS Consumer List

Use the following procedure to update service information for a consumer that appears on the Non-OASIS Consumer List:

1. Select the consumer name link from the search results table. The system displays the **Add / Edit Service Information** window to the right of the **Add / Edit Consumer Name** window, as shown in the following illustration:

2. Select the same service in the **Service** field that appears for the consumer on the **Non-OASIS Consumer List**. For example, the service for Ira Banks is VOCO on the **Non-OASIS Consumer List**, so you would select **VOCO** from the **Service** field.

3. Enter the number of plan hours from the consumer's CCB in the **Plan Consumer Hours** field.

4. Enter the group size from the consumer's CCB in the **Plan Group Size** field.

5. Enter or select a date range in the **Service Start Date** and **Service End Date** fields that encompasses the date shown in the **Service Month** column of the **Non-OASIS Consumer List**. For example, the service month date for Ira Banks is 06/01/2008, so you should enter a date range that includes 06/01/2008.

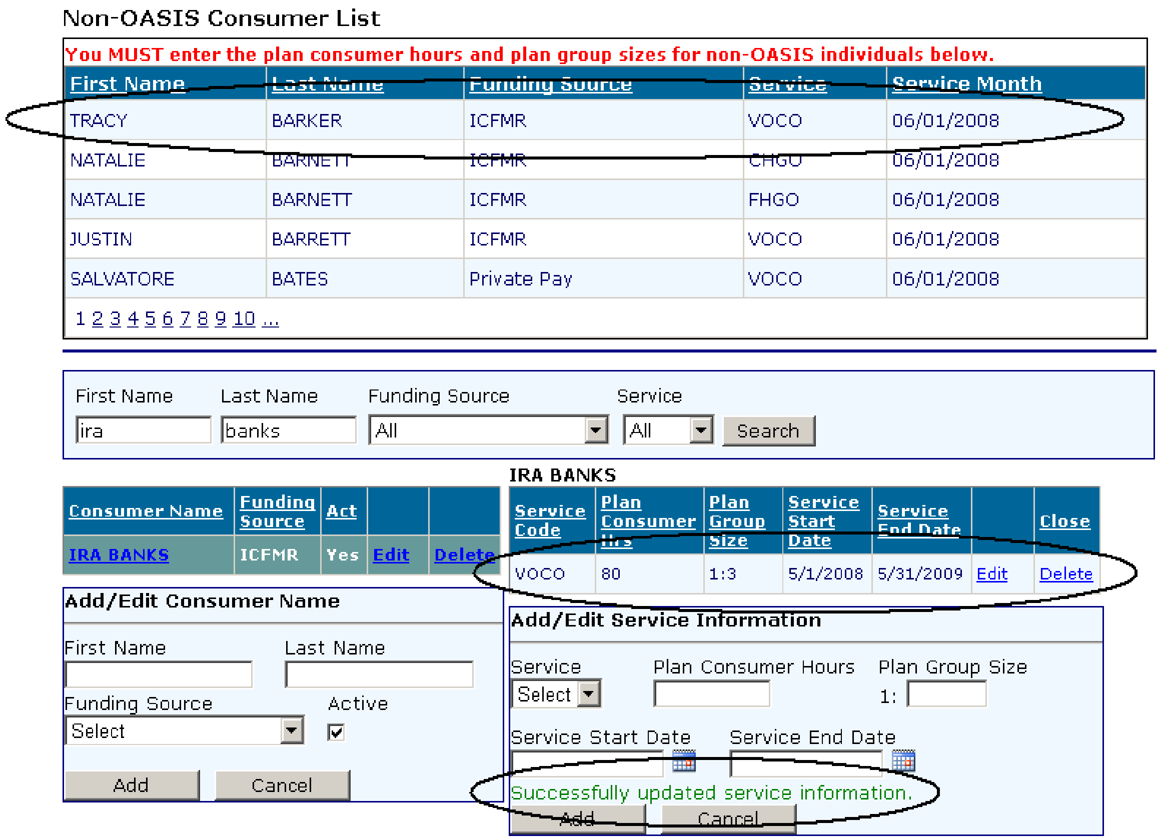
6. Select **Add**. The system:

   - Removes the consumer's name from the **Non-OASIS Consumer List** and moves the next consumer name to the top of the list.

   - Displays the new service information for the consumer in a table above the **Add / Edit Service Information** window.

   - Displays a confirmation message in the **Add / Edit Service Information** window.

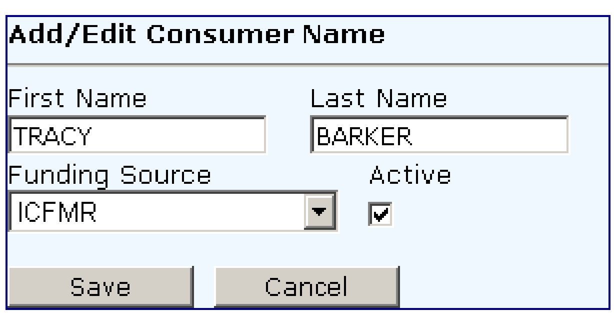
The following illustration shows the changes that occur when you select **Add** to save the changes in the **Add / Edit Service Information** window:



2.1.4 *How to Edit Information for a Consumer on the Non-OASIS Consumer List*

Use the following procedure to edit information for a consumer that appears on the [Non-OASIS Consumer List](#):

1. Select **Edit** from the search results table. The system displays the consumer's information in the **Add / Edit Consumer Name** window, as shown in the following illustration:



2. Change one or more of the fields in the **Add / Edit Consumer Name** window.

Tip

The **Active** checkbox determines whether the system shows or hides the consumer when you are creating a new invoice.

Check the **Active** check box to show the consumer.
Uncheck the **Active** check box to hide the consumer.

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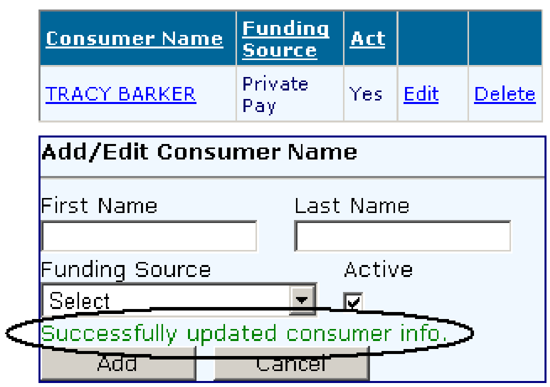
3. Select **Save**. The system updates the information for the consumer in the search results window and adds a confirmation message to the **Add / Edit Consumer Name** window, as shown in the following illustration:



2.1.5 How to Delete a Consumer from the Non-OASIS Consumer List

Use the following procedure to permanently delete a consumer from the Non-OASIS Consumer List.

Important

Performing this procedure permanently deletes a non-OASIS consumer from the **Non-OASIS Consumer List**, requiring you to add the consumer back to the list if you need to include the consumer on future invoices.

Care should be taken to avoid confusion between this feature and the **Delete** links on the **Consumer List** that you can use to remove a non-OASIS consumer from an invoice.

If a finalized invoice exists on the system for the selected consumer, the **Delete** button discussed in Step 1 does not appear and you cannot perform this procedure.

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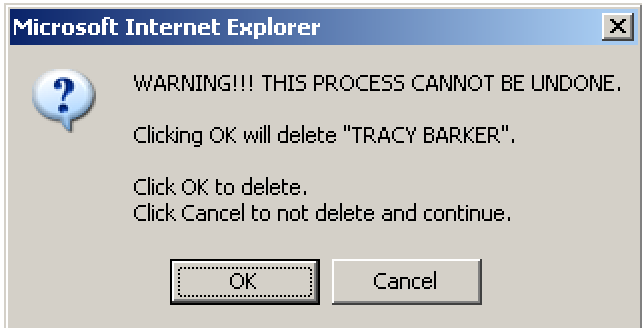
1. Select **Delete** from the search results table. The system displays an alert message similar to the following example:



2. Select **OK**. The system:
   - Removes the consumer from the **Non-OASIS Consumer List**.
   - Redisplays the next five consumers on the list.
   - Removes the search results table from the screen.

3.0 Generating a Day Services Invoice

After you have updated the service information for the consumers on the **Non-OASIS Consumer List** (or if a non-OASIS consumer does not exist for your agency), the Invoices in Progress page appears by default. The following illustration shows an example of the Invoices in Progress page:

Create New Invoice Invoices in Progress Finalized Invoices User Guide Help

Invoices in Progress

Invoice Description | Period: All | Service Month: All | Service Year: All | Status: In Progress | Search | Non-OASIS Consumers

Invoice Description	**Period**	**Service Month/Yr**	**Invoice Total**		
Andrew TEST 2	Monthly	4/2008	$0.00	Edit	Delete
Dons Test	Monthly	4/2008	$12.85	Edit	Delete
kelly test 1	Monthly	4/2008		Edit	Delete
Kent's Test	Monthly	4/2008	$0.00	Edit	Delete
KMF2	Monthly	5/2008	$47.48	Edit	Delete
NJ Test 1	Monthly	1/2008		Edit	Delete
NJ test 3	Bi-weekly	3/2008		Edit	Delete
Pam Test 01 April 2008	Monthly	4/2008	$0.00	Edit	Delete
Pam Test April 01	Monthly	4/2008	$0.00	Edit	Delete
test ks 53008	Monthly	4/2008	$50.49	Edit	Delete

Next >>>

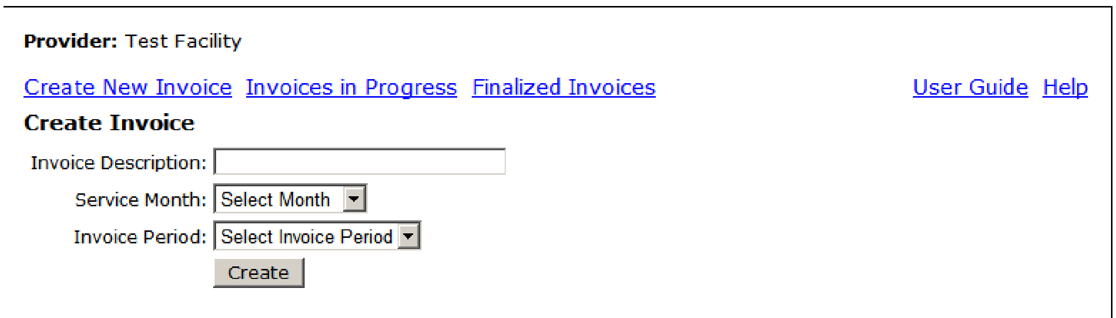
The process of generating a Day Services Invoice consists of the following procedures:

1. Create the new invoice
2. Complete the **Consumer List**
3. Complete the Direct Care Staff Hours page
4. Save and view the invoice
5. Finalize the invoice

3.1 How to Create a Day Services Invoice

Use the following illustrated procedure to create a day services invoice:

1. Select the **Create New Invoice** link at the top of the page. The Create Invoice page appears, as shown in the following illustration:

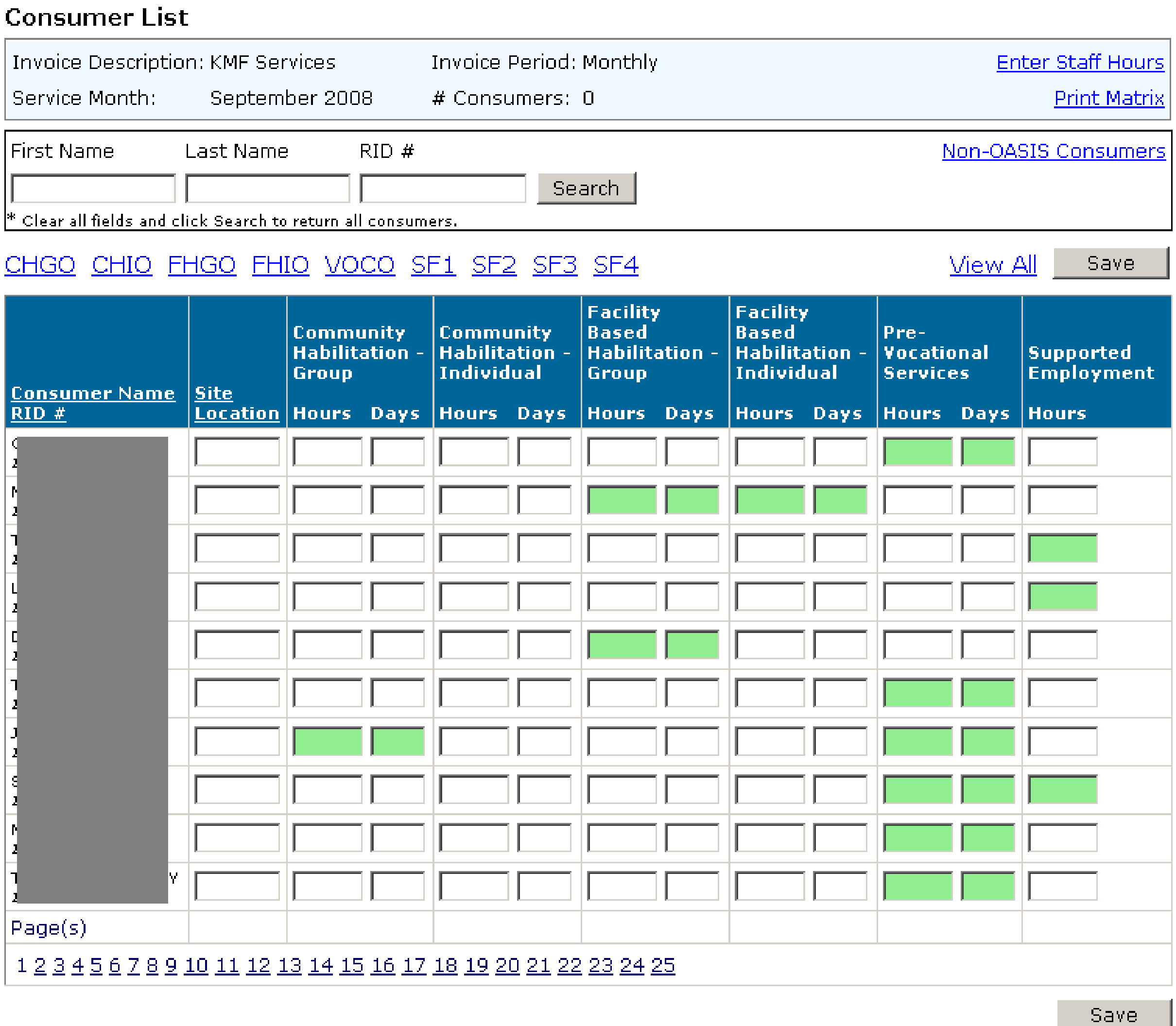


2. Enter a description for the invoice in the **Invoice Description** field.
3. Select the month that the services occurred from the **Service Month** drop-down list.
4. Select the applicable invoice period from the **Invoice Period** drop-down list. Valid entries are:
   - **Monthly**
   - **Bi-weekly**
   - **Bi-monthly – 14 days**
   - **Bi-monthly – 15 days**
   - **Bi-monthly – 16 days**
5. Select **Create**. The system creates the invoice and displays the **Consumer List**.

   You can now complete the **Consumer List** for the invoice. If you choose not to complete the **Consumer List** (for example, you decide to view the invoices in progress or view the finalized invoices on the system instead, the system will retain the invoice on the Invoices in Progress page.

3.2 Completing the Consumer List for an Invoice

After you create a new invoice or select an existing invoice for editing from the Invoices in Progress page, the system displays the **Consumer List**. You can use the **Consumer List** to add, remove, or change invoice information for one or more consumers. The following illustration shows an example of the **Consumer List** for an invoice (with the consumers' names and RID numbers hidden for HIPAA compliance reasons):



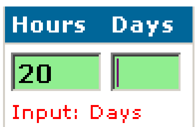
1. Locate a consumer in the **Consumer Name** column to include on the invoice. The system sorts the consumer names in ascending order (A – Z) by last name. If the consumer's name does not appear on the current page, you can select a different page from the list of numbers at the bottom of the page. You can also add a non-OASIS consumer to the **Consumer List** if necessary.

2. Enter one or more values in the cells on the selected consumer's row. Use the following guidelines:

    - Shaded cells indicate services for which the consumer has received allocated funds from the State. The system includes only these values when generating an invoice. However, you should also complete non-shaded (unfunded) cells, as appropriate, because the State uses the Day Services Invoice Tool to track all service activities, not just activities with allocated funds.

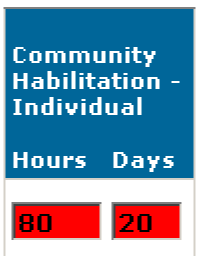
    - Each value in a cell must represent the entire invoice period. For example, if a consumer received 4 hours of Facility Based Habilitation Group care per day for 23 days, you would enter **92** (4*23) in the **Hours** column and **23** in the **Days** column under **Facility Based Habilitation Group**.

    - For columns that contain a pair of cells, you must complete both cells in the column. When you press **TAB** to move from the **Hours** cell to the **Days** cell, the system temporarily displays an input message below the cells, as shown in the following illustration:

    When you enter a value in the **Days** cell, the system removes the message. If you leave the **Days** cell empty, the input message remains on the column.

    - When you enter information for an unfunded service, the cells turn red, as shown in the following illustration:

    - Service links appear as a row of linked service abbreviations above the cells in the **Consumer List**.

The following illustration shows an example of the service links on the **Consumer List**:

CHGO CHIO FHGO FHIO VOCO SF1 SF2 SF3 SF4 View All Save

		Community Habilitation - Group	Community Habilitation - Individual	Facility Based Habilitation - Group	Facility Based Habilitation - Individual	Pre-Vocational Services	Supported Employment

When you select a service link, the system displays the consumers in the list that contain an entry for that service type. The service link also displays the amount of time that a consumer's service exceeded their allotment, as well as the total hours for each column. The following illustration shows an example of the screen for the **SF3** service type (with the consumers' names and RID numbers hidden for HIPAA compliance reasons):

Supported Employment - Tier 3

Invoice Description: MAY INVOICE	Invoice Period: Monthly	Consumer List
Service Month: May 2008		Enter Staff Hours

CHGO CHIO FHGO FHIO VOCO SF1 SF2 SF3 SF4

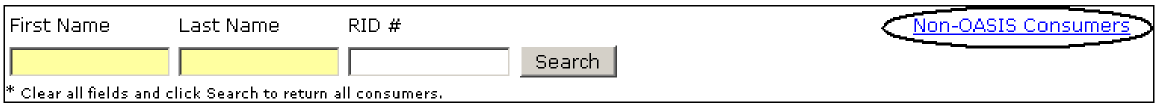
Consumer Name RID #	Approved NOA Units / Planned Consumer Staff Hours	Approved Consumer Hours / Planned Consumer Hours	Remaining NOA Units / Remaining Planned Consumer Staff Hours	Remaining Consumer Hours	Provided Consumer Hours	Days Present	Hours Within Limit
[redacted]	1	15	0	0	12.5		OK
	1	15	0	0	13.25		OK
	1	15	0	0	13.75		OK
	1	15	0	0	15.75		Exceeded by 0.75 Hours
	1	15	0	0	21.5		Exceeded by 6.50 Hours
	1	15	0	0	13.5		OK
	1	15	0	0	18.5		Exceeded by 3.50 Hours
	0	0	0	0	12.75		Exceeded by 12.75 Hours
	7	**105**	**0**	**0**	**121.5**		

After viewing the information on the page, select the **Consumer List** link to redisplay the **Consumer List**.

3. Repeat Steps 1 and 2 as necessary to add more information to the **Consumer List**.
4. Select the **Save** button. You can now complete the Direct Care Staff Hours page for the invoice.

3.2.1 Adding a Non-OASIS Consumer to an Invoice

You can use the **Non-OASIS Consumers** link on the right side of the search window to add a non-waivered consumer to the Consumer List. The following illustration shows the location of the Non-OASIS Consumers link:

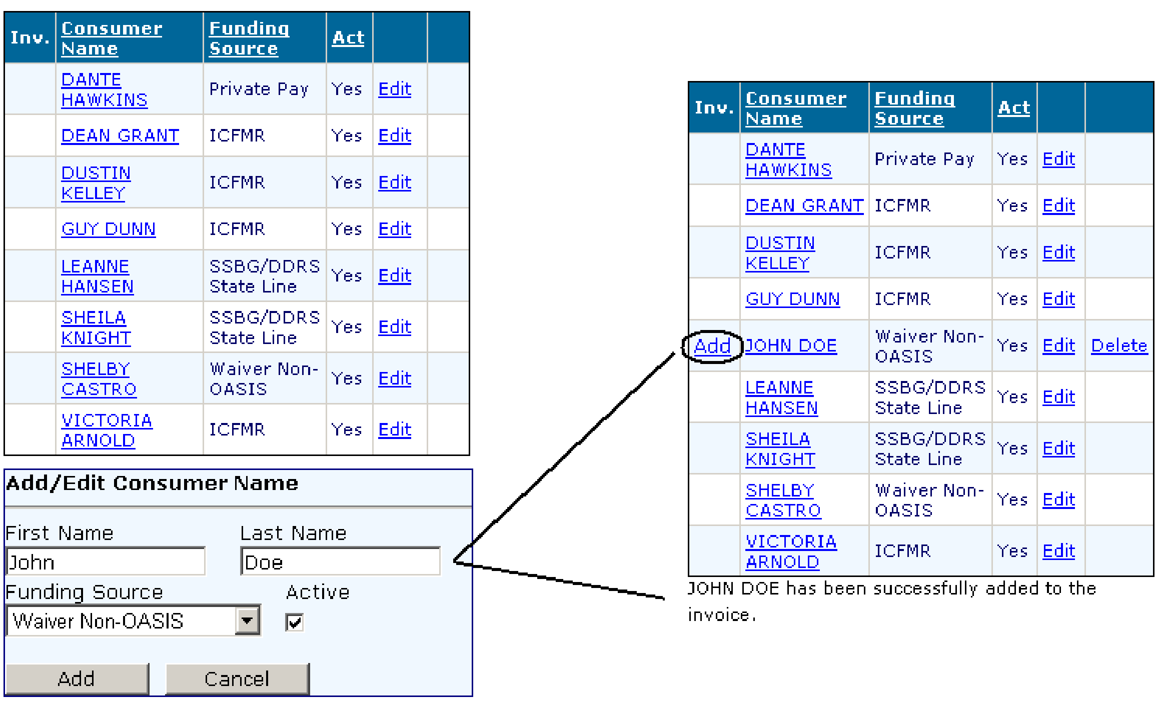


When you select **Non-OASIS Consumers**, the system displays a search results table and the **Add / Edit Consumer Name** window. The search results table and **Add / Edit Consumer Name** window are different than the table and window that appear when you work with consumers on the Non-OASIS Consumer List.

To add a consumer, complete the information in the **Add / Edit Consumer Name** window and select **Add**. The system:

- Places the new consumer name alphabetically in the search results table.
- Displays an **Add** link in the **Inv.** column next to the new consumer name.
- Displays a confirmation message below the search results table.

The following illustration shows an example of a newly added non-waiver consumer:



Select the **Add** link to include the new consumer on the **Consumer List** for the invoice. Select the **Back to Invoice** link in the search window to return to the **Consumer List**.

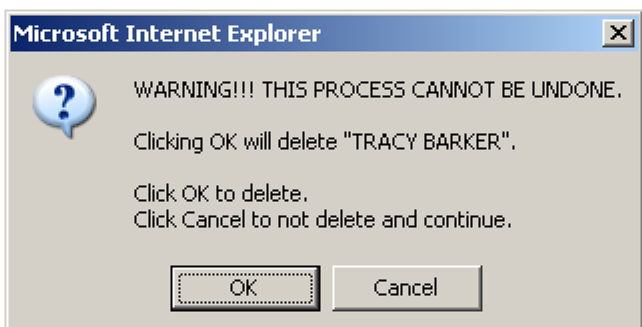
3.2.2 Removing a Non-OASIS Consumer from an Invoice

After you add a non-OASIS consumer to an invoice, the consumer appears at the end of the Consumer List. For example, if the **Consumer List** shows multiple page numbers at the bottom, select the last page or next to last page to display the non-OASIS consumers. You can identify a non-OASIS consumer on the **Consumer List** by the absence of a RID number and the addition of a **Delete** link below the consumer's name in the **Consumer Name** column. The following illustration shows an example of non-OASIS consumers on the **Consumer List**:

Consumer Name RID #	Site Location	Community Habilitation - Group		Community Habilitation - Individual		Facility Based Habilitation - Group		Facility Based Habilitation - Individual		Pre-Vocational Services		Supported Employment
		Hours	Days	Hours	Days	Hours	Days	Hours	Days	Hours	Days	Hours
DARRIN SHAH *183890440912*						21.25	19	5.5	6	12.5	19	
VICTORIA ARNOLD *ICFMR* Delete		16	8			73.25	19					
JOHN DOE *Waiver Non-OASIS* Delete				47.17		53	25					

To remove a non-OASIS consumer:

1. Select the **Delete** link below the consumer's name. The system displays an alert message similar to the following example:



2. Select **OK**. The system removes the consumer from the **Consumer List**.

Tip

Unlike the **Delete** link in the search results window that you can use to delete a consumer from the **Non-OASIS Consumer List**, this feature does NOT permanently delete the consumer from a list. You can still locate and edit the consumer after performing this procedure.

3.3 Completing the Direct Care Staff Hours Page for an Invoice

The Direct Care Staff Hours page displays the calculated hourly values from the services that you selected on the Consumer List. The values that appear were computed by applying the staff ratio to the hours that you entered on the **Consumer List**.

Some consumers are allotted a predefined number of hours per month for a service. If you enter an amount for a predefined service, the system takes into account the allotted amount when computing the final value that appears on the Direct Care Staff Hours page. For example, if you enter 50 service hours for a consumer who is allotted only 10 hours per month for the service, only 10 hours are applied to the Direct Care Staff Hours page. If you enter 7 hours for the same consumer, then only 7 hours are applied to the Direct Care Staff Hours page.

To complete this page, enter the number of hours that staff personnel worked to support each service in the fields in the **Direct Care Staff Hours** column. Select the **Save & View Invoice** button at the bottom of the page when you are finished. The following illustration shows an example of a completed Direct Care Staff Hours page:

Direct Care Staff Hours

Invoice Description: KMF1 Invoice Period: Monthly Consumer List
Service Month: May 2008

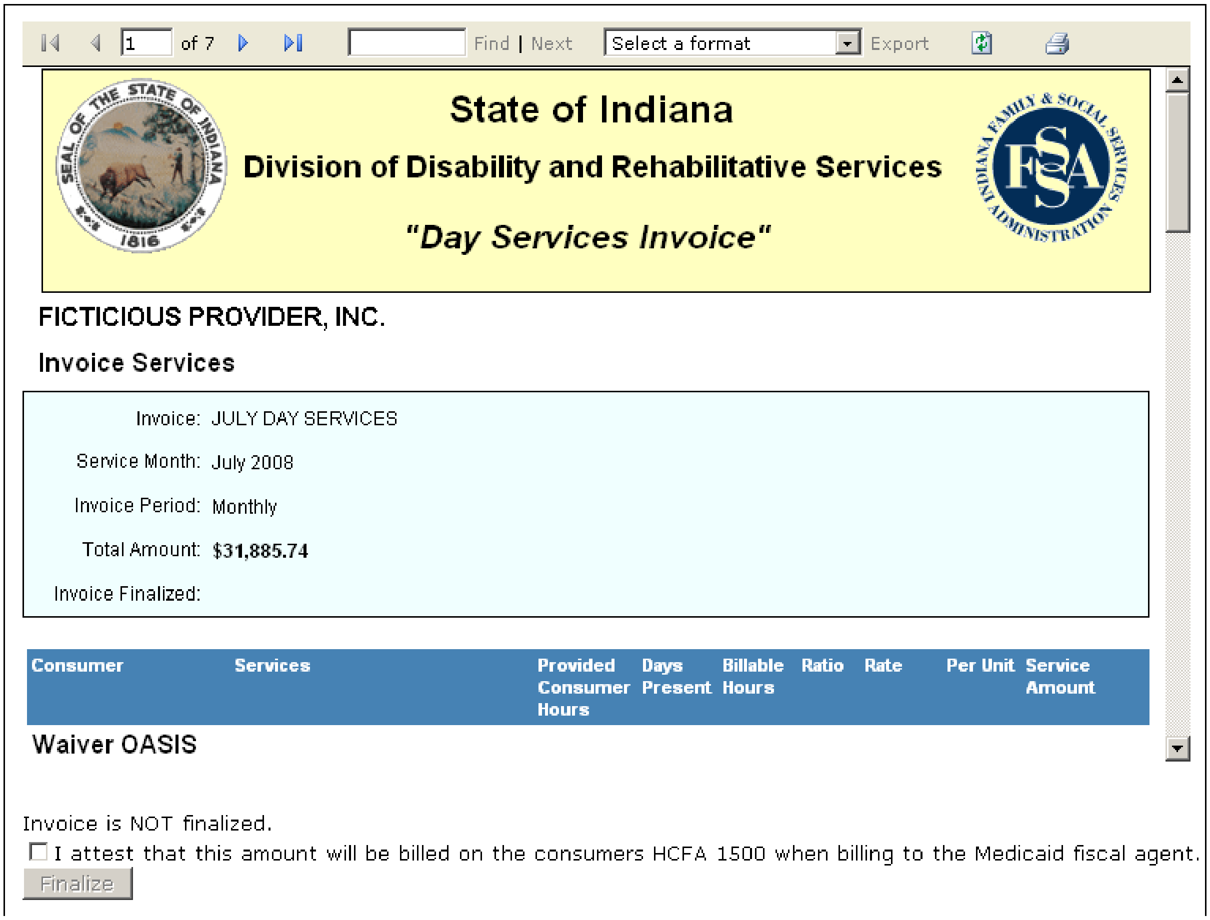
Service	Target Direct Care Staff Hours	Lower Limit	Upper Limit	Direct Care Staff Hours	Billable Hours	Exceeds Target
Community Habilitation - Individual	7.00	6.48	7.35	7	**7.00**	0
Facility Based Habilitation - Group	0.75	0.69	0.79	.75	**0.75**	0
Facility Based Habilitation - Individual	5.00	4.63	5.25	8	**5.00**	3.00
Pre-Vocational Services	8.00	7.40	8.40	8	**8.00**	0
Supported Employment - Tier 2	10.00			10	**10.00**	0

Save & View Invoice

As shown in the illustration, hours that exceed the billable hours for a service appear in red text in the **Exceeds Target** column. These hours are not included on the invoice.

3.4 Saving and Viewing a Day Services Invoice

After you complete the Direct Care Staff Hours page and select the **Save & View Invoice** button at the bottom of the page, the system displays the computed Day Services Invoice as a report on the screen. The following illustration shows an example of a **Day Services Invoice** report:



As shown in the illustration, the **Day Services Invoice** report appears in a limited viewing area on the screen. For ease of use, and to save the invoice to a file, you must export the invoice to a format conducive to viewing and saving (for example, a PDF file or Excel spreadsheet).

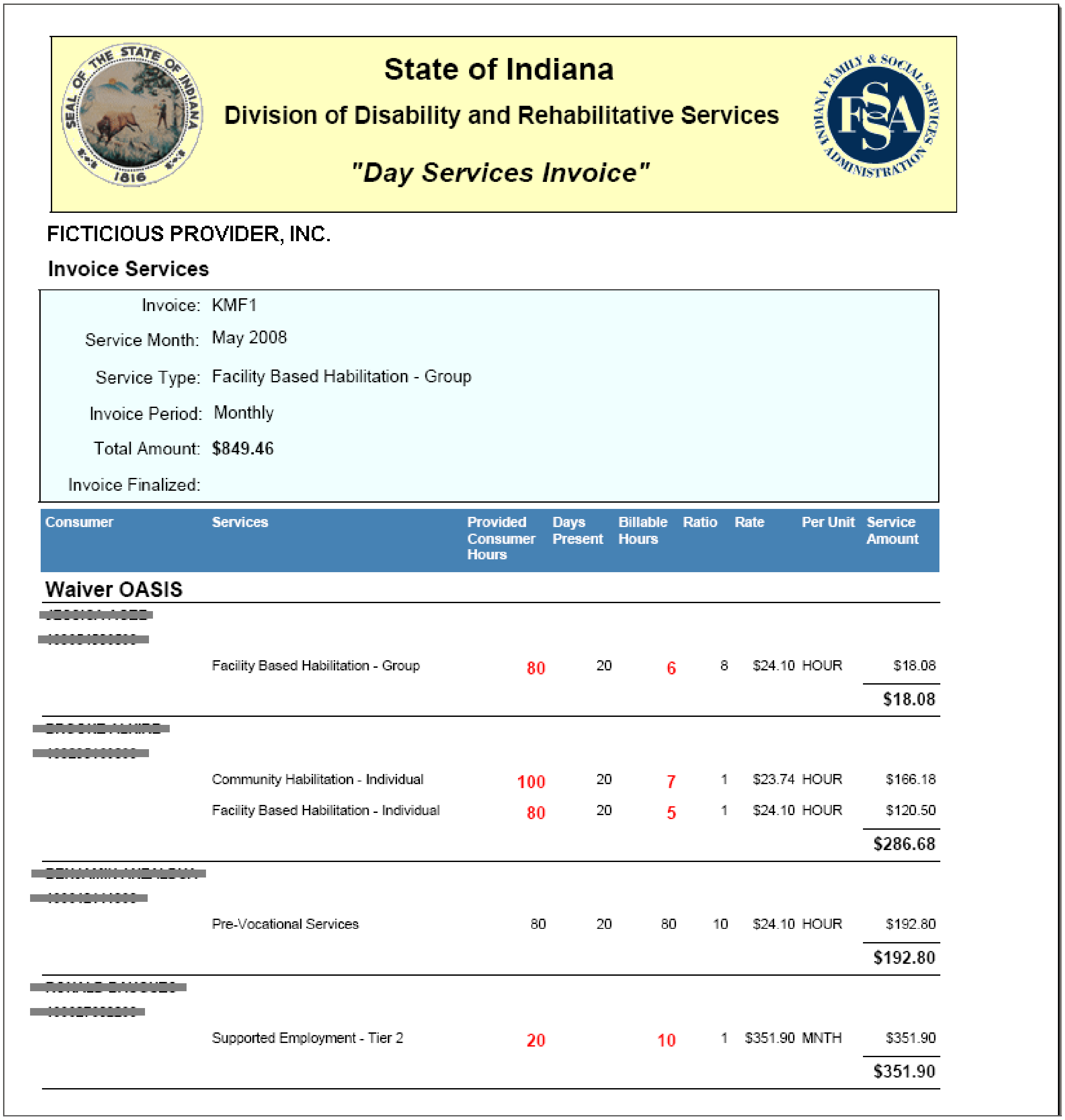
Use the following steps to export an invoice report to a PDF file or Excel spreadsheet:

1. Select **Acrobat (PDF) file** or **Excel** from the **Select a format** drop-down list on the standard toolbar.

2. Select **Export** beside the drop-down list.

3. Select **Open** or **Save** in the **File Download** window that appears.

The following illustration shows an example of a **Day Services Invoice** report in a PDF file (with the consumers' names and RID numbers hidden for HIPAA compliance reasons):



State of Indiana

Division of Disability and Rehabilitative Services

"Day Services Invoice"

FICTICIOUS PROVIDER, INC.

Invoice Services

Invoice:	KMF1
Service Month:	May 2008
Service Type:	Facility Based Habilitation - Group
Invoice Period:	Monthly
Total Amount:	**$849.46**
Invoice Finalized:	

Consumer	Services	Provided Consumer Hours	Days Present	Billable Hours	Ratio	Rate	Per Unit	Service Amount
Waiver OASIS								
[redacted]	Facility Based Habilitation - Group	80	20	6	8	$24.10	HOUR	$18.08
								$18.08
[redacted]	Community Habilitation - Individual	100	20	7	1	$23.74	HOUR	$166.18
	Facility Based Habilitation - Individual	80	20	5	1	$24.10	HOUR	$120.50
								$286.68
[redacted]	Pre-Vocational Services	80	20	80	10	$24.10	HOUR	$192.80
								$192.80
[redacted]	Supported Employment - Tier 2	20		10	1	$351.90	MNTH	$351.90
								$351.90

After you print or save the invoice file, you can finalize the invoice.

Tip

The system does not require you to finalize the invoice at this time. You can leave the invoice in the Invoices in Progress page to work on later.

3.5 How to Finalize a Day Services Invoice

After you save and view a Day Services Invoice, you can finalize the invoice. When you finalize an invoice, the system creates a permanent record of the invoice and prevents any further changes. Use the following steps to finalize a Day Services Invoice:

1. View the Day Services Invoice.
2. Select the following check box that appears below the **Day Services Invoice** report on the screen:

    I attest that this amount will be billed on the consumers HCFA 1500 when billing to the Medicaid fiscal agent.

    The **Finalize** button becomes available.

3. Select the **Finalize** button. A message similar to the following example appears above the check box:

    Invoice finalized on 6/12/2008

4.0 Working with Invoices in Progress

After you create a new Day Services Invoice and before you finalize the invoice, the system stores the invoice on the Invoices in Progress page. You can access the Invoices in Progress page by selecting the **Invoices in Progress** link at the top of the screen. The following illustration shows an example of the Invoices in Progress page:

Create New Invoice Invoices in Progress Finalized Invoices User Guide Help

Invoices in Progress

Invoice Description | Period: All | Service Month: All | Service Year: All | Status: In Progress | Search | Non-OASIS Consumers

Invoice Description	Period	Service Month/Yr	Invoice Total		
Andrew TEST 2	Monthly	4/2008	$0.00	Edit	Delete
Dons Test	Monthly	4/2008	$12.85	Edit	Delete
kelly test 1	Monthly	4/2008		Edit	Delete
Kent's Test	Monthly	4/2008	$0.00	Edit	Delete
KMF2	Monthly	5/2008	$47.48	Edit	Delete
NJ Test 1	Monthly	1/2008		Edit	Delete
NJ test 3	Bi-weekly	3/2008		Edit	Delete
Pam Test 01 April 2008	Monthly	4/2008	$0.00	Edit	Delete
Pam Test April 01	Monthly	4/2008	$0.00	Edit	Delete
test ks 53008	Monthly	4/2008	$50.49	Edit	Delete

Next >>>

When multiple pages of invoices exist, the **Next >>>** and **<<< Prev** links appear below the list so that you can move to the next or previous page.

You can also use the fields in the box above the list to search for an invoice when multiple pages of invoices exist. To search for an invoice, enter information into one or more of the fields and select the **Search** button. The more information you enter, the more accurate the search and the more likely the system will locate the invoice you need.

Select the **Delete** link in an invoice row to delete the invoice. A warning message appears, indicating that the deletion is permanent. Select **OK** in the message window to complete the deletion.

Select the **Edit** link in an invoice row to redisplay the Consumer List for the invoice. You can then add or remove information to change the results of the invoice. You can edit an invoice until you finalize the invoice. After you finalize an invoice, the system prevents any further changes. The following illustration shows an example of a **Consumer List** that has been selected for editing:

Create New Invoice Invoices in Progress Finalized Invoices User Guide Help

Consumer List

Invoice Description: JULY DAY SERVICES Invoice Period: Monthly Enter Staff Hours
Service Month: July 2008 # Consumers: 92 Print Matrix

First Name Last Name RID # Search Non-OASIS Consumers
* Clear all fields and click Search to return all consumers.

CHGO CHIO FHGO FHIO VOCO SF1 SF2 SF3 SF4 View All Save

Consumer Name RID #	Site Location	Community Habilitation - Group		Community Habilitation - Individual		Facility Based Habilitation - Group		Facility Based Habilitation - Individual		Pre-Vocational Services		Supported Employment
		Hours	Days	Hours	Days	Hours	Days	Hours	Days	Hours	Days	Hours
VERONICA CHANEY 170668014785		6	1			57.75	19	4.75	2			
VICKY FROST 173054577794				25.25	10			33.75	11			
NINA FISCHER 170673837474		8.75	4	2.5	1	65.75	14	12.5	9			6
JENIFER WALKER 170674153969												
DONOVAN FRANK 173018153095				4.75	4							7.75
LEE WATERS 173018154367												
JOSEPH GRIFFITH 170684481077		9.25	4	5	3	18.25	7	2	2			
JORGE DAVID 171988632970		24.75	11			65	21	19.5	12			
KEITH CHERRY 170713711892		5	2									
LEA BARR 170858236287						8	1			0.25	1	
Page(s)												
1 2 3 4 5 6 7 8 9												

Save

Some of the features that you can use while editing the **Consumer List** include:

User Guide Select the User Guide link to display a PDF version of this user guide in a separate window. You must have a PDF viewer loaded on your PC to use this link.

Help Select the **Help** link located in the upper right corner to send an email to the FTST and OASIS-ICAP support teams. The system automatically populates the **To** field with the team addresses.

Enter Staff Hours Select the **Enter Staff Hours** link to display the Direct Care Staff Hours page for the invoice.

Search fields The search fields are located in a box below the **Consumer List** header. You can use any combination of first name, last name, and RID number to locate a consumer.

Service links — The service links appear as a row of blue links below the search box. When you select a service link, the system displays the consumers in the list that have an entry for that service type.

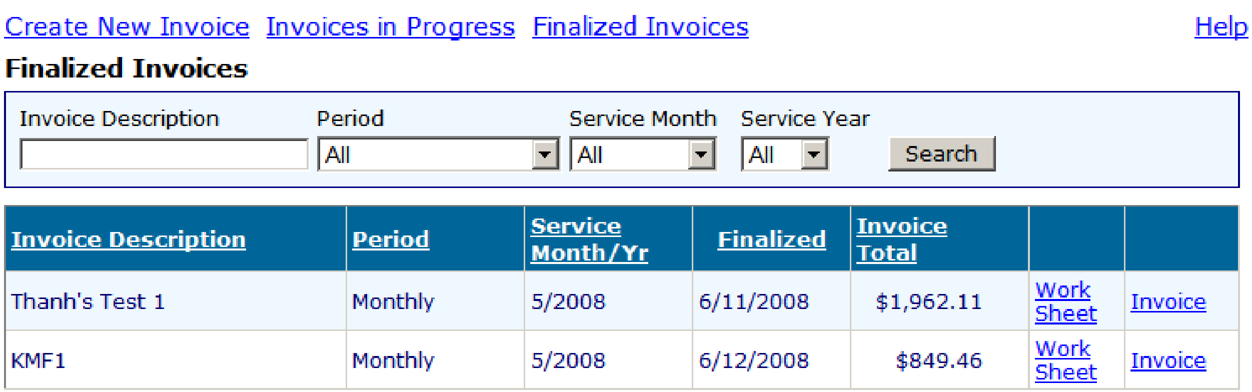
View All — The **View All** link appears to the right of the sort links, and displays all of the consumers for your agency in one scrolling region. A scroll bar appears so that you can scroll through the region to locate a consumer.

Edit in Pages — The **Edit in Pages** link replaces the **View All** link when you select **View All**, and returns the **Consumer List** back to the default view of multiple pages.

Save — Two **Save** buttons appear above and below the **Consumer List** so that you can save your changes.

5.0 Working with Finalized Invoices

After you finalize an invoice, the system removes the invoice from the Invoices in Progress page and displays the invoice on the Finalized Invoices list for one year. You can access the Finalized Invoices list by selecting the **Finalized Invoices** link at the top of each page. The following illustration shows an example of the Finalized Invoices list:


Create New Invoice Invoices in Progress Finalized Invoices Help

Finalized Invoices

Invoice Description | Period: All | Service Month: All | Service Year: All | Search

Invoice Description	Period	Service Month/Yr	Finalized	Invoice Total		
Thanh's Test 1	Monthly	5/2008	6/11/2008	$1,962.11	Work Sheet	Invoice
KMF1	Monthly	5/2008	6/12/2008	$849.46	Work Sheet	Invoice

Select the **Work Sheet** link to display a read-only version of the Consumer List for the invoice.

Select the **Invoice** link to display the **Day Services Invoice** report.